

## PERSONAL FINANCIAL STATEMENT

### PERSONAL FINANCIAL STATEMENT AS OF

Name of Individual:

Social Security No.:

Age:

Spouse's Name:

Social Security No.:

Age:

Residence Address:

Occupation:

ASSETS	*	COST BASIS	MARKET VALUE BASIS	LIABILITIES	*	TOTAL AMOUNT	MONTHLY PAYMENTS
Cash in Bank	1			Loans Payable - Bank	7		
Notes Receivable	2			Note Payable	8		
Accounts Receivable	2			Accounts Payable	8		
Government Bonds / Marketable Securities	3			Taxes Payable	9		
Real Estate - Homestead	4			Mortgages Payable	4		
Real Estate - Investments	4			Other Liabilities	10		
Cash Value Life Ins.	5						
Other Assets	6			<b>TOTAL LIABILITIES:</b>			
Car-Household Furnishings				<b>**NET WORTH:</b>			<b>**Assets (Cash Basis) - Liabilities</b>
<b>TOTAL ASSETS:</b>				<b>TOTAL LIABILITIES AND NET WORTH:</b>			<b>Net Worth</b>

### INCOME

Salary:

Real Estate Income:

Bonus / Commission:

Other:

**TOTAL INCOME:**

### \*SUPPLEMENTARY SCHEDULES

NOTE: All data listed above must appear on the appropriate schedules. Insert "none" where appropriate. Designate if owned jointly.

#### 1. CASH IN BANK

Name, Branch and Location of Bank	Account Number	Amount

#### 2. NOTES AND ACCOUNTS RECEIVABLE

Names and Address of Debtor	Amount	Due Date	Security	Pledged to Whom

#### 3. BONDS AND MARKETABLE SECURITIES

Name of Security	Exchange List	No. of Shares	Price Per Share	Total Market Value

**4. REAL ESTATE**

Location / Description	Year Acq'd	Cost	Market Value	Monthly Income	Monthly Payment	Mortgage Balance	Mortgage or Lien Holder

**5. CASH VALUE OF LIFE INSURANCE**

Name and Address of Company	Beneficiary	Face Value	Cash Value	Amount of Loans Against

**6. OTHER ASSETS**

Description	Title Holder	Cost	Market Value	Age of Assets

**7. LOANS PAYABLE**

Name of Lender	Address	Balance Due	Amount Due in One Year	How Secured

**8. ACCOUNTS AND NOTES PAYABLE (Including Charge Accounts)**

Payable to Whom	Address	Amount	Date Payment as Due	How Secured

**9. TAXES PAYABLE (State & Federal)**

Description	Amount	Date Payment as Due

**10. ACCOUNTS AND NOTES PAYABLE (Including Charge Accounts)**

Location / Description	Payable to Whom	Amount	Date Payment as Due	How Secured

Are you contingently liable or endorser on any bonds or other obligation?

 Yes\*  No

Are you involved in any litigation?

 Yes\*  No

\*Explain all YES answers on separate sheet of paper

Have you filed for bankruptcy in the last 7 years?

 Yes\*  No

Each Applicant authorizes Bonding Solutions, LLC and respective surety companies to obtain information from third parties, including personal credit reports, in connection with underwriting and each Applicant's compliance with indemnity agreements, bonded contracts and bonds. Each Applicant releases such third parties from liability resulting from the provision of such information. Accept this as notice given to comply with the Federal fair Credit Reporting Act (Public law 91-508) and any/all state laws which are applicable. As part of underwriting, a routine credit report may be pulled on any Indemnitor/Applicant which will provide information concerning credit worthiness, credit standing, credit capacity, character, general reputation, personal characteristics and mode of living. A copy of the Indemnitor/Applicant's report may be provided if requested.

Signature:

Date: \_\_\_\_\_

Signature:

Date: \_\_\_\_\_